



ROADMAP TO DOWNTOWN SAN FRANCISCO'S FUTURE

WHY DOWNTOWN SAN FRANCISCO?

- Downtown is the engine of San Francisco's economy
 - Nearly **80% of San Francisco's GDP came from Downtown** companies in 2021
 - Downtown and office core was home to **70% of San Francisco jobs** pre-pandemic
 - Nearly **half of our sales tax revenue and 95% of business tax revenue** comes from Downtown
- Downtown offers unique advantages
 - Downtown's **transportation network** makes it more connected to the Bay Area's high-skilled workforce than anywhere else
 - Downtown's **built environment** features a dynamic public realm, cultural institutions, and millions of square feet of existing space



COVID ECONOMIC IMPACTS

- **Office attendance** remains at 40% of pre-pandemic levels, contributing to an **office vacancy rate** of 26% (vs 6% pre-pandemic)
- **Downtown BART exits** are 36% of pre-pandemic levels, but increasing
- **Air travel and hotel stays** began rebounding in 2022, but remain down
 - Air travel is at 80% of 2019 levels
 - Hotel occupancy is at 67% of 2019 levels
- These impacts are reflected in the **City's tax base**:
 - **Property tax** growth is projected to slow and some office property valuations are likely to be reassessed downward
 - **Business tax** is down 10% and not projected to recover until 2025
 - **Hotel tax** is down 37% and not projected to recover until 2027
 - **Sales tax** is down 12% and not projected to recover before 2028
- **Small businesses** are struggling, but business starts increased in March



MAYOR BREED'S VISION

Five priorities for Downtown



- An economically diverse and resilient job engine
- A welcoming, clean, and safe environment
- A dynamic destination active at all hours, every day
- A world-class transportation experience
- An equitable economy that supports full participation by all





Roadmap to Downtown San Francisco's future

"In San Francisco, we don't just face our challenges - we grow stronger in overcoming them."

— Mayor London N. Breed

[Learn more about the Mayor's vision](#)



Our strategies



Ensure Downtown is clean, safe, and inviting

Investing in a clean and safe downtown is essential to attracting new businesses as well as workforce, visitors, and residents.

[Learn more](#)



Attract and retain a diverse range of industries and employers

Supporting long-standing sectors maintains the strength of San Francisco's economic core, while attracting new businesses and industries increases our economic resilience.

[Learn more](#)



Facilitate new uses and flexibility in buildings

Maximizing the variety of uses and flexibility in our buildings creates the spaces and services that a diverse industry base needs to succeed and will help San Francisco's Downtown recover faster.

[Learn more](#)

Our Strategies



ENSURE DOWNTOWN IS CLEAN, SAFE, AND INVITING



- Support businesses, residents, and visitors with an **enhanced public safety presence**.
- Continue and grow **Healthy Streets coordinated response** programs that connect people with services while keeping streets and sidewalks safe for everyone.
- Implement **street vending regulations** to discourage resale of stolen merchandise and keeping sidewalks accessible.
- Provide a welcoming gateway to Downtown attractions through increased **parking garage security** at City garages.
- Continue to partner with CBDs to keep sidewalks and plazas clean through the **311 Connected Worker App**.
- Continue to fund and expand **targeted cleaning crews** in key areas and hot spots.
- Welcome transit riders and visitors Downtown with **refurbished transit platforms, and shelters**.



ATTRACT AND RETAIN A DIVERSE RANGE OF INDUSTRIES AND EMPLOYERS



- Support businesses recovery with ongoing **tax relief and incentives** in key sectors.
- **Explore business tax reform** to adapt to shifting work patterns and make our tax base more resilient and competitive.
- Complete a **Competitive Industries Assessment** to identify high-potential industries and supporting strategies.
- Launch a **business attraction campaign** to bring new ventures in high-potential industries to San Francisco.
- Continue attracting convention and business travel with the **Moscone Recovery Fund**.
- **Increase filming in Downtown** to promote San Francisco's image and develop the local film industry.



FACILITATE NEW USES AND FLEXIBILITY IN BUILDINGS



- Amend the Planning Code to ensure **flexible zoning Downtown** to accommodate the widest possible range of activities and uses.
- Prepare a **housing conversion analysis** to identify the feasibility of office-to-residential conversions and recommend supporting policy changes.
- Develop a **recovery entitlement program** that would allow time and flexibility for previously entitled development projects to adjust to market conditions.



MAKE IT EASIER TO START AND GROW A BUSINESS



- Provide direct **business recovery assistance** including grants and loans.
- Expanded the **First Year Free** program to reduce permit costs for new business ventures.
- **Right-size local employer healthcare contributions** under the Health Care Security Ordinance (HCSO).
- Connect new ventures to ground floor vacancies and provide support through a new **Vacant to Vibrant** program.
- Build on the Save Our Small Business Initiative and SBRA to deliver **smoother business permitting**.
- Modernize processes and add resources to **support businesses at the Permit Center**.
- **Streamline business inspections** to reduce delays and unexpected costs for new and existing businesses.



GROW AND PREPARE OUR WORKFORCE



- Implement the Mayor's Housing for All plan to **deliver housing for our workforce**.
- Provide **industry-informed training programs** that target resources to employers' shifting needs.
- **Expand outreach to grow the workforce** through programs that match new job seekers and those outside the labor force with emerging opportunities.



TRANSFORM DOWNTOWN INTO A LEADING ARTS, CULTURE, AND NIGHTLIFE DESTINATION



- Designate an **Arts, Culture and Entertainment (ACE) Zone** with targeted City programs and incentives to foster new arts and culture establishments.
- Continue supporting **public space events and activations** that showcase local talent, entrepreneurs and culture.
- **Permitting improvements for community events** to support neighborhood festivals and street fairs.
- Advocate for and implement state legislation to allow for **outdoor alcohol consumption in Entertainment Zones** in select areas.
- **Leverage the Moscone Visitor Center** as a point to connect guests to local arts, culture, and entertainment offerings.



ENHANCE PUBLIC SPACES TO SHOWCASE DOWNTOWN



- Complete the transition of **Shared Spaces** to a permanent program allowing businesses to activate streets, plazas, and sidewalks.
- Continue adding **new design elements** in public spaces to showcase Downtown's environment and support community activities.
- Create **new points of interest** that attract visitors and encourage gatherings in public spaces like the Landing at Leidesdorff.
- **Reimagine transit stations** as platforms for local art and talent to support local artists and spark interest Downtown.



INVEST IN TRANSPORTATION CONNECTIONS



- Make it easy for workers, residents and visitors to travel Downtown with **improved Muni connections**.
- Provide **faster trips to Downtown** with ongoing Muni Forward improvements on key lines.
- Work with City and regional partners to **bring high-speed rail to the Salesforce Transit Center**.
- Pursue new strategies to ensure **long-term financial stability for Muni**.
- Ensure biking is safe and convenient with a more connected and protected **Downtown bike network**.
- Strategically deploy traffic control officers to **keep traffic moving Downtown**.
- Make Muni a more attractive option with **cellular service in the Metro**.
- Launch additional **fare pass programs** to boost Muni ridership.



TELL OUR STORY



- Promote a national **visitor attraction campaign** in targeted markets to remind potential visitors of San Francisco's unique allure.
- Launch the **Heart of SF social media campaign** to amplify a cohesive narrative around Downtown's evolving identity.
- Develop a **San Francisco recovery campaign** to put forward overall positive stories of San Francisco.
- Update this Roadmap as our story evolves at **sf.gov/roadmap-downtown-san-franciscos-future**

